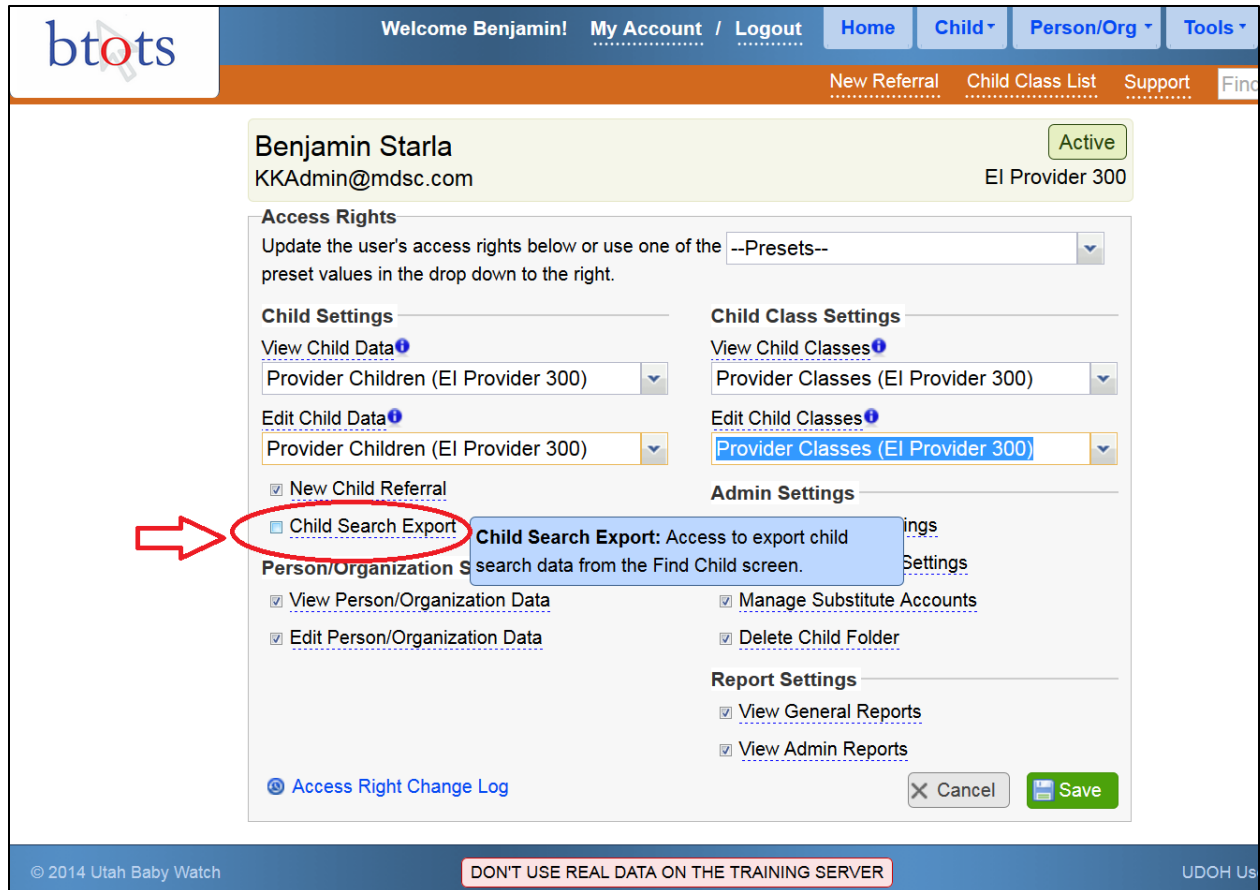


## Child Find Export and Print Feature

This help document will demonstrate how to use the “Advanced Search” and “Export and Print” feature under the “Child Find” menu.

### Access Rights

In order to export and print a child list from the “Child Find” menu, the “Child Search Export” access rights setting must be checked. Figure 1 below illustrates where the “Child Search Export” check box is located. Note: a program administrator will have access to the export feature and will need to set the access right for other BTOTS users.



The screenshot displays the BTOTS user interface for configuring access rights for a user named Benjamin Starla (KKAdmin@mdsc.com). The page is divided into several sections:

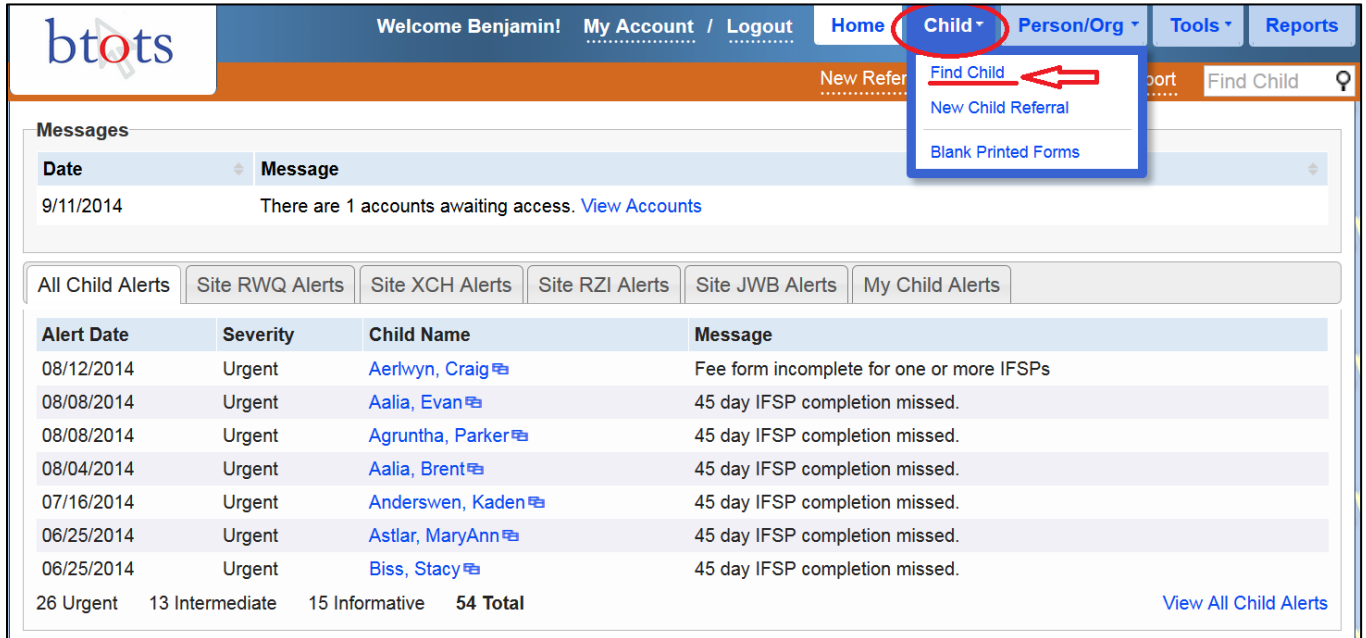
- Access Rights:** Includes a dropdown for presets and instructions to update access rights.
- Child Settings:** Contains dropdowns for 'View Child Data' and 'Edit Child Data', both set to 'Provider Children (EI Provider 300)'. It also features a checked checkbox for 'New Child Referral' and an unchecked checkbox for 'Child Search Export', which is highlighted with a red circle and a red arrow. A tooltip for 'Child Search Export' states: 'Child Search Export: Access to export child search data from the Find Child screen.'
- Child Class Settings:** Contains dropdowns for 'View Child Classes' and 'Edit Child Classes', both set to 'Provider Classes (EI Provider 300)'.
- Admin Settings:** Includes checkboxes for 'Manage Substitute Accounts' and 'Delete Child Folder', both of which are checked.
- Report Settings:** Includes checkboxes for 'View General Reports' and 'View Admin Reports', both of which are checked.

At the bottom of the configuration area, there is an 'Access Right Change Log' link, a 'Cancel' button, and a 'Save' button. The footer of the page includes copyright information for 2014 Utah Baby Watch, a warning not to use real data on the training server, and the UDOH logo.

Figure 1: “Child Search Export” check box.

### Step 1: Select “Find Child” from the “Child” drop-down.

To view the “Find Child” list, select “Find Child” from the “Child” drop-down, as shown in Figure 2.



The screenshot shows the btots application interface. At the top, there is a navigation bar with the btots logo, a welcome message 'Welcome Benjamin!', and links for 'My Account', 'Logout', 'Home', 'Child', 'Person/Org', 'Tools', and 'Reports'. The 'Child' dropdown menu is open, showing options: 'Find Child', 'New Child Referral', and 'Blank Printed Forms'. A red arrow points to the 'Find Child' option. Below the navigation bar, there is a 'Messages' section with a table showing a message from 9/11/2014: 'There are 1 accounts awaiting access. [View Accounts](#)'. Below the messages, there is a section for 'All Child Alerts' with a table showing alert details. The table has columns for 'Alert Date', 'Severity', 'Child Name', and 'Message'. The table lists several alerts, all with a severity of 'Urgent' and a message about '45 day IFSP completion missed'. At the bottom of the table, there is a summary: '26 Urgent 13 Intermediate 15 Informative 54 Total' and a link to 'View All Child Alerts'.

Alert Date	Severity	Child Name	Message
08/12/2014	Urgent	<a href="#">Aerlwyn, Craig</a>	Fee form incomplete for one or more IFSPs
08/08/2014	Urgent	<a href="#">Aalia, Evan</a>	45 day IFSP completion missed.
08/08/2014	Urgent	<a href="#">Agruntha, Parker</a>	45 day IFSP completion missed.
08/04/2014	Urgent	<a href="#">Aalia, Brent</a>	45 day IFSP completion missed.
07/16/2014	Urgent	<a href="#">Anderswen, Kaden</a>	45 day IFSP completion missed.
06/25/2014	Urgent	<a href="#">Astlar, MaryAnn</a>	45 day IFSP completion missed.
06/25/2014	Urgent	<a href="#">Biss, Stacy</a>	45 day IFSP completion missed.
26 Urgent	13 Intermediate	15 Informative	54 Total

Figure 2: “Find Child.”

## Step 2: Choose “Advanced Search.”

Once in the “Find Child” screen, click on “Advanced Search,” which will give the user the ability to select from the drop-down options. As shown in the screenshot in Figure 3 below, current drop-downs available for the “Advanced Search” are:

- eligibility category;
- service category;
- medical diagnosis;
- associated phone number;
- service provider;
- service coordinator;
- site; and
- primary language.

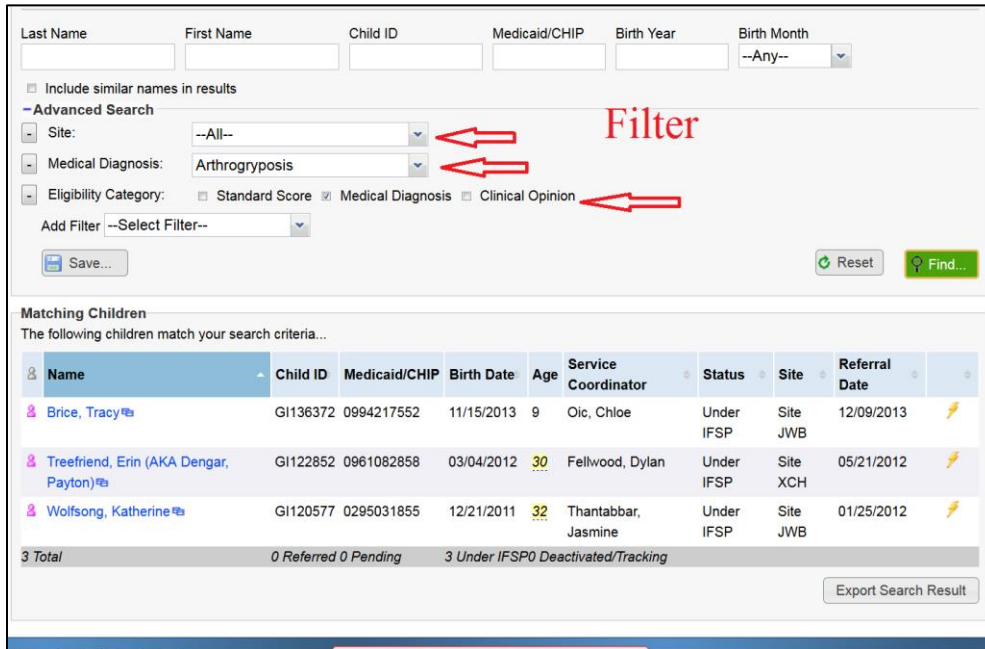
Appendix A: Category Drop-downs and Associated Filters provides a detailed list of all drop-downs and their associated filter options.

The screenshot shows the 'Find Child' interface. At the top, there's a navigation bar with 'btots' logo and user information 'Welcome Benjamin!'. Below this is a 'Find Child' section with a search bar and a dropdown for 'Select Saved Search--'. The 'Basic Search' section includes checkboxes for 'Child Status' (Referred, Pending, Under IFSP, Deactivated, All Deactivated, Tracking Only) and 'Child Group' (All, My Children, Unassigned). There are also input fields for 'Last Name', 'First Name', 'Child ID', 'Medicaid/CHIP', 'Birth Year', and 'Birth Month'. A checkbox for 'Include similar names in results' is present. The 'Advanced Search' section is highlighted with a red circle. It contains an 'Add Filter' dropdown menu with a red arrow pointing to it. The dropdown menu is open, showing a list of filter options: Eligibility Category, Service Category, Medical Diagnosis, Associated Phone Number, Service Coordinator, Service Provider, Site, and Primary Language. There are 'Reset' and 'Find...' buttons at the bottom right of the search area. The footer includes copyright information, a disclaimer, and the version number.

Figure 3: “Advanced Search” option.

### Step 3: Filter children.

The “Advanced Search” feature allows the user to select one or more drop-downs in order to identify children with specific characteristics. As shown in the example of Figure 4, “Site,” “Medical Diagnosis,” and “Eligibility Category” are the three drop-downs that were chosen. For each drop-down, further select the filter(s) of interest and click “Find,” which will result in a list of children being generated who meet the specifications of the drop-down(s) and filter(s) chosen.



Last Name  First Name  Child ID  Medicaid/CHIP  Birth Year  Birth Month  --Any--

☐ Include similar names in results

**Advanced Search**

Site: --All--

Medical Diagnosis: Arthrogryposis

Eligibility Category: ☐ Standard Score ☒ Medical Diagnosis ☐ Clinical Opinion

Add Filter --Select Filter--

**Matching Children**  
 The following children match your search criteria...

Name	Child ID	Medicaid/CHIP	Birth Date	Age	Service Coordinator	Status	Site	Referral Date
Brice, Tracy	GI136372	0994217552	11/15/2013	9	Oic, Chloe	Under IFSP	Site JWB	12/09/2013
Treefriend, Erin (AKA Dengar, Payton)	GI122852	0961082858	03/04/2012	30	Fellwood, Dylan	Under IFSP	Site XCH	05/21/2012
Wolfsong, Katherine	GI120577	0295031855	12/21/2011	32	Thantabbar, Jasmine	Under IFSP	Site JWB	01/25/2012
<b>3 Total</b>	<b>0 Referred 0 Pending</b>	<b>3 Under IFSP0 Deactivated/Tracking</b>						

Figure 4: Filter Child List.

**Step 4: Export child list.**

Once the export access right is checked for the user and drop-downs and filters are selected, click “Export Search Result,” which is located below the child list at the bottom right, as shown in Figure 5.

The screenshot displays the Child Find search interface. At the top, there are input fields for Last Name, First Name, Child ID, Medicaid/CHIP, Birth Year, and Birth Month. Below these are checkboxes for 'Include similar names in results' and an 'Advanced Search' section. The Advanced Search section includes a 'Site' dropdown (set to '--All--'), a 'Medical Diagnosis' dropdown (set to 'Arthrogryposis'), and an 'Eligibility Category' section with checkboxes for 'Standard Score', 'Medical Diagnosis' (checked), and 'Clinical Opinion'. There is also an 'Add Filter' dropdown (set to '--Select Filter--') and a 'Save...' button. To the right of the filters are 'Reset' and 'Find...' buttons.

Below the filters, a section titled 'Matching Children' states 'The following children match your search criteria...'. It contains a table with the following data:

Name	Child ID	Medicaid/CHIP	Birth Date	Age	Service Coordinator	Status	Site	Referral Date
Brice, Tracy	GI136372	0994217552	11/15/2013	9	Olc, Chloe	Under IFSP	Site JWB	12/09/2013
Treefriend, Erin (AKA Dengar, Payton)	GI122852	0961082858	03/04/2012	30	Fellwood, Dylan	Under IFSP	Site XCH	05/21/2012
Wolfsong, Katherine	GI120577	0295031855	12/21/2011	32	Thantabbar, Jasmine	Under IFSP	Site JWB	01/25/2012
3 Total      0 Referred 0 Pending      3 Under IFSP0 Deactivated/Tracking								

At the bottom right of the interface, there is an 'Export Search Result' button, which is highlighted with a red arrow and a red circle.

Figure 5: Export Search Result.

### Step 5: Select fields to export and print.

After clicking on “Export Search Result,” the user will be able to select the “Export Format” type, as well as the search results fields of interest to export. Four export types or formats are available to the user: (1) CSV; (2) XML; (3); PDF; and (4) HTML.

File Type	Definition
CSV	CSV is the acronym for a “Comma Separated Values” file, which allows data to be saved in a table structured format. CSVs look like a garden-variety spreadsheet but with a .csv extension (Traditionally they take the form of a text file containing information separated by commas, hence the name).
XML	XML is the acronym for “Extensible Markup Language” file, which allows the text to be read by users and computers. This format is more text concentrated.
PDF	PDF is the acronym for “Portable Document Format,” which allows the file to be transferred and opened independent of software or hardware. This format will keep the original formatting when sent via email.
HTML	HTML is the acronym for “Hyper Text Markup Language,” which allows a web browser to easily read the text. This format allows images and objects to be viewable on websites.

Once the export format and fields are selected, click “Export,” as shown in Figure 6.

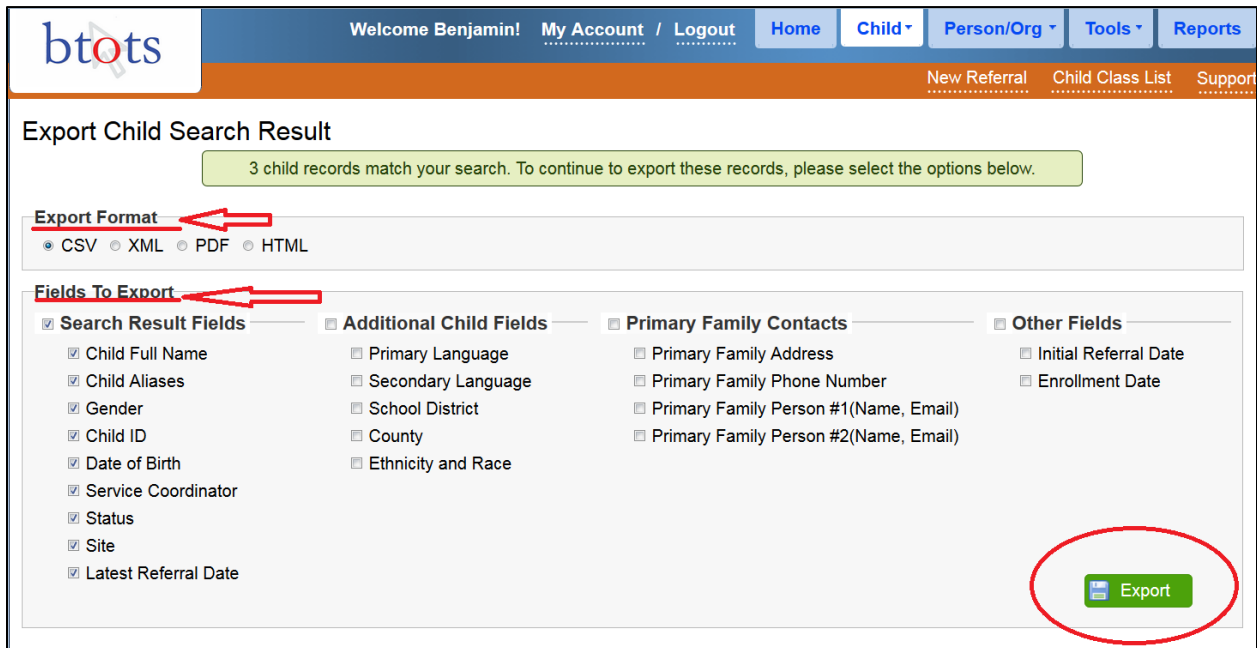


Figure 6: Export Format and Fields.

### Step 6: Print child list.

Now the child list will be exported to a printable format. Figure 7 illustrates the CSV format; Figure 8, the XML format; Figure 9, the PDF format; and Figure 10, the HTML format.

A	B	C	D	E	F	G	H	I	J	K
Child Full Name	Child Aliases	Gender	Child ID	Date of Birth	Service Coordinator	Status	Site	Latest Referral Date		
Brice, Tracy		Female	GI136372	11/15/2013	Oic, Chloe	Under IFSI	Site JWB	#####		
Treefriend, Erin	Dengar, Payton	Female	GI122852	3/4/2012	Fellwood, Dylan	Under IFSI	Site XCH	#####		
Wolfsong, Katherine		Female	GI120577	12/21/2011	Thantabbar, Jasmine	Under IFSI	Site JWB	#####		

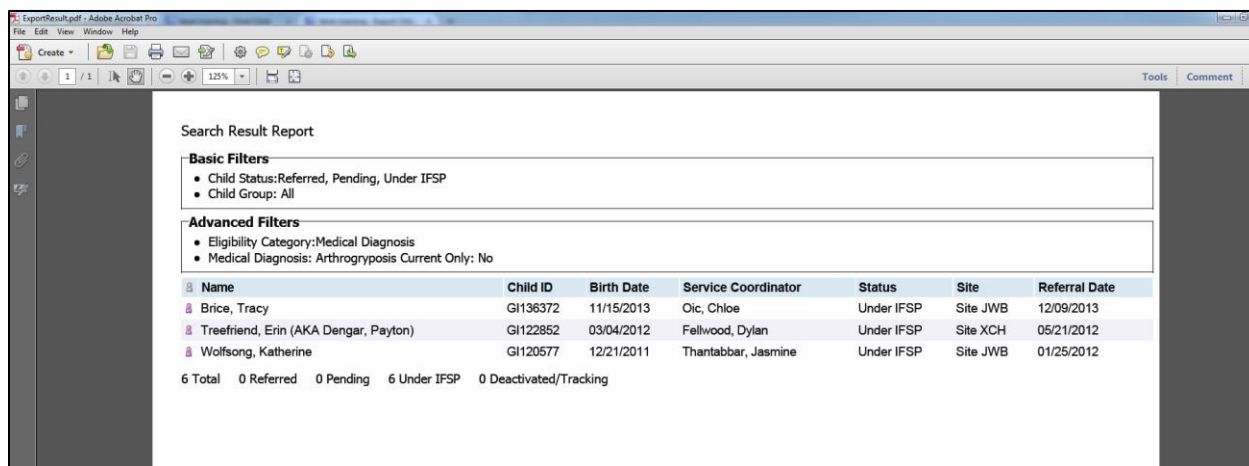
Figure 7: CSV Format

```

<?xml version="1.0"?>
- <exported_children>
  - <child>
    <child_full_name>Tracy Brice</child_full_name>
    <child_aliases/>
    <gender>Female</gender>
    <child_id>GI136372</child_id>
    <date_of_birth>11/15/2013</date_of_birth>
    <service_coordinator>Oic, Chloe</service_coordinator>
    <status>Under IFSP</status>
    <site>Site JWB</site>
    <latest_referral_date>12/09/2013</latest_referral_date>
  </child>
  - <child>
    <child_full_name>Erin Treefriend</child_full_name>
    <child_aliases>Dengar, Payton</child_aliases>
    <gender>Female</gender>
    <child_id>GI122852</child_id>
    <date_of_birth>03/04/2012</date_of_birth>
    <service_coordinator>Fellwood, Dylan</service_coordinator>
    <status>Under IFSP</status>
    <site>Site XCH</site>
    <latest_referral_date>05/21/2012</latest_referral_date>
  </child>
  - <child>
    <child_full_name>Katherine Wolfsong</child_full_name>
    <child_aliases/>
    <gender>Female</gender>
    <child_id>GI120577</child_id>
    <date_of_birth>12/21/2011</date_of_birth>
    <service_coordinator>Thantabbar, Jasmine</service_coordinator>
    <status>Under IFSP</status>
    <site>Site JWB</site>
    <latest_referral_date>01/25/2012</latest_referral_date>
  </child>
</exported_children>

```

Figure 8: XML Format



Search Result Report

**Basic Filters**

- Child Status: Referred, Pending, Under IFSP
- Child Group: All

**Advanced Filters**

- Eligibility Category: Medical Diagnosis
- Medical Diagnosis: Arthrogryposis Current Only: No

Name	Child ID	Birth Date	Service Coordinator	Status	Site	Referral Date
Brice, Tracy	GI136372	11/15/2013	Oic, Chloe	Under IFSP	Site JWB	12/09/2013
Treefriend, Erin (AKA Dengar, Payton)	GI122852	03/04/2012	Fellwood, Dylan	Under IFSP	Site XCH	05/21/2012
Wolfsong, Katherine	GI120577	12/21/2011	Thantabbar, Jasmine	Under IFSP	Site JWB	01/25/2012

6 Total   0 Referred   0 Pending   6 Under IFSP   0 Deactivated/Tracking

Figure 9: PDF Format

Search Result Report							
<b>Basic Filters</b> <ul style="list-style-type: none"> <li>Child Status: Referred, Pending, Under IFSP</li> <li>Child Group: All</li> </ul>							
<b>Advanced Filters</b> <ul style="list-style-type: none"> <li>Eligibility Category: Medical Diagnosis</li> <li>Medical Diagnosis: Arthrogryposis Current Only: No</li> </ul>							
Name	Child ID	Birth Date	Service Coordinator	Status	Site	Referral Date	
Brice, Tracy	GI136372	11/15/2013	Oic, Chloe	Under IFSP	Site JWB	12/09/2013	
Treefriend, Erin (AKA Dengar, Payton)	GI122852	03/04/2012	Fellwood, Dylan	Under IFSP	Site XCH	05/21/2012	
Wolfsong, Katherine	GI120577	12/21/2011	Thantabbar, Jasmine	Under IFSP	Site JWB	01/25/2012	
6 Total    0 Referred    0 Pending    6 Under IFSP    0 Deactivated/Tracking							

Figure 10: HTML Format



## Appendix A: Category Drop-downs and Associated Filters.

- **Drop-down Category:** Eligibility
  - **Filters:** Standard Score, Medical Diagnosis, Informed Clinical Opinion
- **Drop-down Category:** Service
  - **Filters:** Special Instruction, OT, PT, SLP Family Training, Assistive Technology, Audiology, Health Services, Medical, Nursing, Nutrition, Psychological, Respite Care
- **Drop-down Category:** Medical Diagnosis
  - **Filters:** 18 Q Deletion, 49 XXXXY Syndrome, Acardi Syndrome, Albinism, All unbalanced structural chromosome syndrome, Amyoplasia Congentia, Angelman Syndrome, Aniridia, Anophthalmia, Apert Syndrome, Arthrogryposis, Autistic Spectrum Disorders, Bardet-Biedl Syndrome
- **Drop-down Category:** Associated Phone Number
  - **Filters:** Child phone number(s)
- **Drop-down Category:** Service Coordinator
  - **Filters:** Service Coordinator names in the user's early intervention program
- **Drop-down Category:** Service Provider
  - **Filters:** Service provider names in the user's early intervention program
- **Drop-down Category:** Site
  - **Filters:** Site Locations
- **Drop-down Category:** Primary Language
  - **Filters:** Languages able to select at referral